

# Global Tray Filler Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Tray Filler market size was valued at US\$ 257 million in 2025 and is forecast to a readjusted size of US\$ 409 million by 2032 with a CAGR of 6.8% during review period.

A Tray Filler (also referred to as a Seed Tray Filler or Seedling Tray Filling Machine) is an agricultural automation equipment specifically designed to accurately and efficiently fill growing media such as soil, substrate, or potting mix into seedling trays or trays with multiple cells. It is widely used in commercial nurseries, greenhouse facilities, horticultural farms, and modern agricultural nurseries to support large-scale seedling production by automating the tray filling process. The core components of the machine typically include a material hopper, metering device, tray positioning system, vibration or tamping mechanism, and a programmable logic controller (PLC) based control panel for automated operation.

Tray Fillers can be configured to accommodate various tray formats (e.g., 32-cell, 50-cell, 72-cell formats) and enable rapid adjustment of fill depth and volume to ensure uniformity across all cells. Compared to manual tray filling, this automated approach significantly improves work speed, reduces labor intensity, and minimizes substrate waste and operator error, ultimately contributing to higher seedling consistency and better crop establishment. These machines can be integrated into automated nursery production lines in coordination with seeding machines, transplanting units, and other cultivation equipment. Designed for agricultural environments, they often incorporate corrosion-resistant materials, easy-access panels for cleaning, and anti-clogging features to ensure long-term reliability and uninterrupted operation.

The Tray Filler market shows substantial growth potential, primarily driven by the

ongoing automation in modern agriculture and the increasing demand from large-scale commercial nurseries. With the rapid expansion of greenhouse farming, horticulture, and commercial seedling production, efficiency and seedling quality increasingly rely on automated equipment, propelling the adoption of tray fillers. In regions such as Europe, North America, and Asia-Pacific, greenhouse operations and nursery scales continue to expand, creating strong demand for high-efficiency, adjustable tray filling machines. Furthermore, government and industry standards for seedling quality enhance the value and acceptance of automated tray filling equipment. By adopting tray fillers, enterprises can not only reduce labor intensity and costs but also improve seedling survival rates through standardized tray depth and uniformity, which further boosts market attractiveness. Technological advancements, including PLC control, sensor feedback, and automatic soil volume adjustment, continuously improve precision, efficiency, and reproducibility, attracting investment from large commercial nurseries and horticultural operations.

Nevertheless, the industry faces several challenges and risks. First, tray fillers are specialized agricultural machinery with high technical barriers, limited production capacity for small and medium enterprises, and relatively high equipment costs, which may deter smaller nurseries from purchasing. Second, different crops and tray formats demand varying soil depth, density, and filling speed, requiring high adjustability in equipment, thus placing greater demands on manufacturers' R&D and after-sales support. Moreover, market competition is intensifying, with multiple domestic and international suppliers offering similar products, making technological differentiation and service quality key competitive factors. Supply chain disruptions, raw material price fluctuations, and energy cost increases may impact equipment costs and profitability. Finally, global economic fluctuations and agricultural policy changes may indirectly affect purchasing decisions, requiring manufacturers to monitor subsidies and automation trends to mitigate market uncertainties.

Downstream demand trends indicate that tray fillers are moving toward multi-functionality, intelligent operation, and environmental sustainability. High-end nurseries and facility farms demand greater automation, fill precision, and energy efficiency, motivating manufacturers to innovate in PLC control, sensor integration, data logging, and soil vibration optimization. Enterprises also increasingly require machines compatible with multiple tray sizes and capable of rapid adjustments to accommodate diverse seedling types and specifications. Environmentally, equipment often incorporates recyclable or recirculated soil delivery systems to reduce substrate waste and minimize operator contamination, balancing eco-friendliness and economic benefits. Overall, downstream users are trending towards automation, high precision,

intelligent control, and sustainability, providing ongoing momentum for the future growth of the tray filler industry.

This report is a detailed and comprehensive analysis for global Tray Filler market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Tray Filler market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Tray Filler market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Tray Filler market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Tray Filler market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

#### The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Tray Filler
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Tray Filler market based on the following

parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Urbinati Srl, Flier Systems B.V., Mayer Gruppe / Mayer Group, Pack Manufacturing Company, Viscon Group (Twin Filler), HETO, Williames, BCC AB, Ellepot USA, Ellis Products, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

## Market Segmentation

Tray Filler market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

600 p/h

700 p/h

1000 p/h

1100 p/h

1500 p/h

Others

### Market segment by Manufacturing Process

Manufacturing Process

Modular Bolted Frame Construction

Sheet Metal Pressed Construction

## Cast Component Based Construction

### Market segment by Drive System Type

Electric Motor Drive

Hydraulic Drive

Pneumatic Drive

Stepper/Servo Controlled Drive

### Market segment by Control System Type

PLC Control System

Embedded Microcontroller Control

PC / HMI Supervisory Control

IoT/Network Enabled Control

### Market segment by Application

Soil Transport

Transplant Seeding

Others

### Major players covered

Urbinati Srl

Flier Systems B.V.

Mayer Gruppe / Mayer Group

Pack Manufacturing Company

Viscon Group (Twin Filler)

HETO

Williames

BCC AB

Ellepot USA

Ellis Products

Visser Horti Systems

Blackmore Co.

Shandong Kexinde Machinery Co., Ltd.

Suzhou Lihanwei Automation Equipment Co., Ltd.

Zhucheng Mingtu Machinery Co., Ltd.

Shenzhen Tailichuangsi Technology Co., Ltd.

Jiangsu Zhengheng Light Industry Machinery Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Tray Filler product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Tray Filler, with price, sales quantity, revenue, and global market share of Tray Filler from 2021 to 2026.

Chapter 3, the Tray Filler competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Tray Filler breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Tray Filler market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Tray Filler.

Chapter 14 and 15, to describe Tray Filler sales channel, distributors, customers, research findings and conclusion.

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